

Handling Household Contacts

COVID-19 Community Team Outreach

This revised job aid includes the latest iteration of the household feature as of May 7th, 2021.

NOTE: All the members of a household should have separate contact profiles within the household. Each contact must receive individual assessments.

CCTO's household feature can help to streamline your outreach and reduce data entry:

Creating a New Household

The household feature allows you to create a grouped profile for contacts whom it is advantageous to group together to reduce data entry and streamline outreach. If you know you will be entering new contacts who are members of the same household, **create the household first**.

1. To create a new household, **begin on the Households Tab and select "New."**
2. In the "Household Name" field, type an identifying name for your household per your local guidance.
3. If known, you can then use "Primary Contact" to indicate a member of this household who may be speaking on behalf of others; however, it is recommended that you create the household first before creating this contact. You can return to the household profile and add this primary contact at any time.
4. Indicate the primary language of this household in "Preferred Language."
5. Fill out the boxes for "Source Case Info," "Contact Information," and "Address" with information appropriate to the whole household. **This information will carry over to new contacts you create within this household to help reduce data entry; however, you are always able to edit and adjust information as needed for individual contacts.**
6. Click "Save" when you are finished. This profile will now appear in your "Households" Tab, and you can add contacts to it.

- 1 **"New"**
- 2 **"Household Name"**
- 3 **"Primary Contact"**
- 4 **"Preferred Language"**
- 5 **Populate Household Info**
- 6 **"Save"**

H#	Household Name
H-0000000951	Banks Family
H-0000000802	Brady Family
H-0000001196	Family Household123
H-0000001200	Glass Family
H-0000000672	House Trial Household
H-0000001146	Peanut Household Family

HOUSEHOLD INFORMATION

H# ---

Household Name * **Ingalls Family**

Primary Contact ---

Preferred Language **English**

Source Case Info

NC-COVID Event ID of Source Patient #1 **101200300**

Last Date of Exposure to Source Patient #1 9/24/2020

Ongoing Exposure **Yes**

NC-COVID Event ID of Source Patient #2 ---

Last Date of Exposure to Source Patient #2 ---

Source Patient Name ---

Contact Information

Country Code ---

Mobile Phone (will be used for text messages) **1-555-444-7777**

Phone #2 ---

Phone #3 ---

Email **ingallsfamily@littlehouse.com**

Preferred Method of Contact **Phone Call**

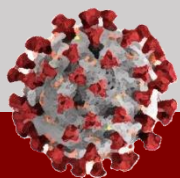
ADDRESS

Street 1 **123 Little House Lane**

Street 2 ---

City **Duck**

H#	Household Name
H-0000000951	Banks Family
H-0000000802	Brady Family
H-0000001196	Family Household123
H-0000001200	Glass Family
H-0000000672	House Trial Household
H-0000001295	Ingalls Family



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Adding New Contacts to Your Household

This process is for **new contacts who have not yet been entered in CCTO**. See below for adding existing contacts.

1. Always **begin this process on the household's profile to reduce data entry**. Select "Household Members" from the top of the household profile to see any existing members.
2. Select "New Contact" on the **RIGHT** of the screen to add a new contact (who does not currently exist in the system) to this household.
3. Because you started from the "Household Members" page, a New Contact screen will appear **with pre-populated information from the household profile**. Input the remaining information about your new contact or adjust any of the pre-populated information as needed.
4. Click "Save and Close" when finished to return to the "Household Members" page, and repeat the process if necessary.

- 1 "Household Members"
- 2 "New Contact"
- 3 Input Remaining Info
- 4 "Save & Close"

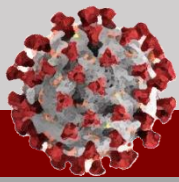
NOTE: Always enter all the members of a household as separate contacts, including as much information as possible about each individual. Each contact will receive separate assessments.

Adding Existing Contacts to Your Household

Note that existing contacts do not take on household information when they become members of a household, so it is always best to create households first whenever possible.

1. Begin on the contact's profile. Under "Basic Info," use the "Household" field to search and select the household you have created that applies to this contact.
2. Save your work.
3. Your contact will now appear as a member of your household.

- 1 "Household"
- 2 "Save"
- 3 Updated Household



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Reassigning & Deactivating Households

1. Reassigning a household using the "Assign" button from the household profile will reassign all its contacts.
2. Deactivating a household will not deactivate any of the contacts within it. Contact members must be deactivated by profile after deactivating the household. Similarly, deactivating all household contacts will not deactivate the household, and it must be deactivated independently.

1

"Assign"

2

Deactivating members

Indicating Household Relationships

1. From the "Household Members" page on your household profile, click a contact's name.
2. Under "Basic Info," review the options under the "Household Relationship" field and select the option that applies to your contact.
3. As a note, if you select "Child under 13" or "Child 13-17," you should also ensure you have selected "Is Minor" and provided schooling information in "Demographic Info," if applicable. You may also wish to select "Requires Proxy" for children under 13 whose assessments will be completed by their parents.
4. Click "Save & Close" when finished with your work, and repeat this process as needed.

1

Contact Profile

2

"Household Relationship"

3

Confirm Info for Minors

4

"Save & Close"

1

Ingalls Family Household

✓	Last Name	First Name	Household	Mobile Phone	Monitoring Status	Preferred L.	Preferred Method of Contact	Is Minor	Is Student	School Name	Household Relationship
✓	Ingalls	Pa	Ingalls Family	1-555-444-5123	Monitoring	English	Email	No	No	---	Mary Moran
✓	Ingalls	Laura	Ingalls Family	1-555-444-7777	---	English	Phone Call	Yes	Yes	Plum Cree...	Mary Moran

2

Ingalls Family Household

Owner

Julia Covid-Temp

3

Ingalls Family Household

Household Members

Read-only This record's status is inactive.

4

My Active Contacts

Deactivate

Deactivate these Contacts.

You can reactivate these Contacts from the Inactive Contacts View.

5

Ingalls Family Household

Household Members

6

Laura Ingalls Contact - MDA Form

ARIAS Contact Assessments System Information Related

Basic Info

C# C-0000037426

First Name * Laura

Last Name * Ingalls

Date of Birth (DOB) * 9/1/2011

Is Minor ☒ Yes

Household Ingalls Family

Household Relationship Child under 13

Requires Proxy

Contact Information

Country Code

7

Save Save & Close New Deactivate Connect Assign Email a Link Delete

8

Laura Ingalls Contact - MDA Form

ARIAS Contact Assessments System Information Related

Basic Info

C# C-0000037426

First Name * Laura

Last Name * Ingalls

Date of Birth (DOB) * 9/1/2011

Is Minor ☒ Yes

Household Ingalls Family

Household Relationship Child under 13

Requires Proxy

9

Save Save & Close New Deactivate Connect Assign Email a Link Delete

10

Laura Ingalls Contact - MDA Form

ARIAS Contact Assessments System Information Related

Basic Info

C# C-0000037426

First Name * Laura

Last Name * Ingalls

Date of Birth (DOB) * 9/1/2011

Is Minor ☒ Yes

Household Ingalls Family

Household Relationship Child under 13

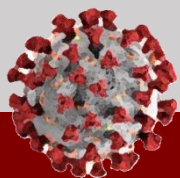
Requires Proxy

11

Demographic Info

Is Student ☒ Yes

School Name Plum Creek School



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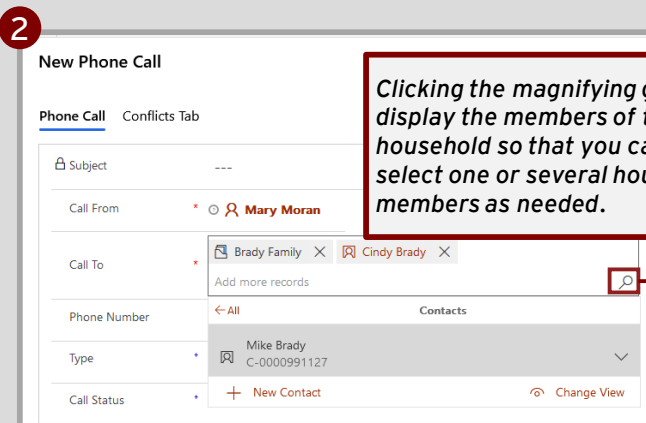
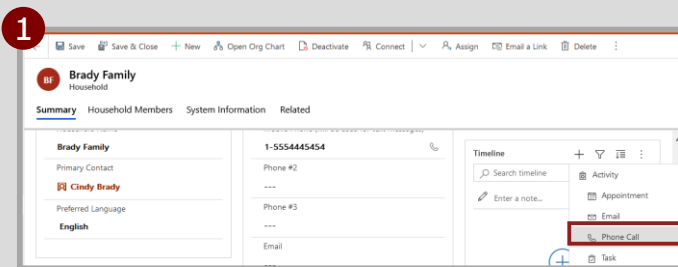
Creating Phone Calls from a Household Profile

Users can create a phone call from within a household profile and have it transfer onto members' individual contact/case profiles, **meaning that phone calls do not need to be logged manually for each household member while making a household call.**

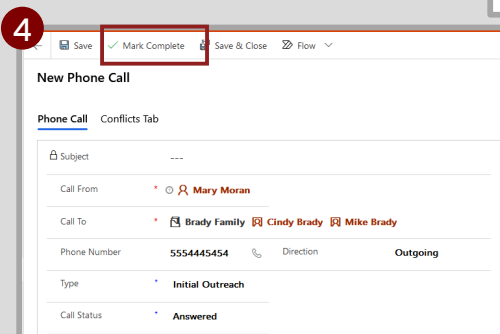
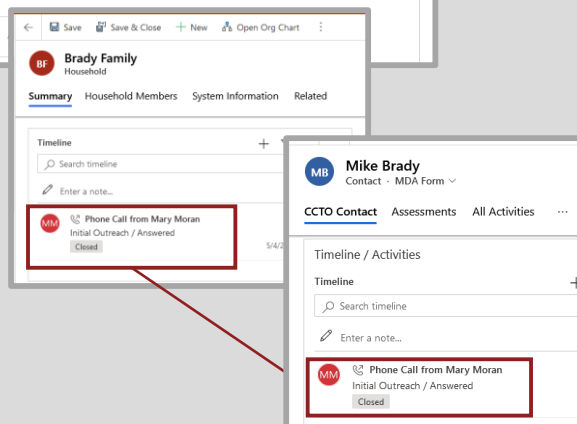
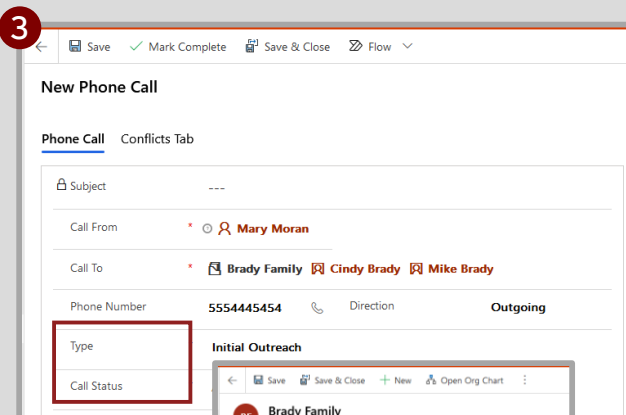
1. In Timeline/Activities on a household profile, click + → "Phone Call."
2. In **Call To**, add the individual names of the household members who are included in the phone call. Clicking on the magnifying glass will limit the names displayed to only those in the household.

Any names you add in "Call To" will have this phone call **transfer onto the Timeline/Activities section of their individual profile** (even if they are not part of the household); however, this phone call **will not appear on the All Activities page within any household member profiles.**

3. Continue filling out the remaining phone call fields as normal. When you save, **each member you listed in the Call To section of the household phone call will display this phone call in the Timeline/Activities section of their profile.** Any updates you make to this call (including closure or deletion) will transfer automatically to the Timeline/Activities section of all individuals listed in the **Call To** field.
4. When you have completed the phone call, close it by clicking **Mark Complete** or by using the checkmark in Timeline/Activities, and each instance of this phone call will also close.



Clicking the magnifying glass will display the members of this household so that you can easily select one or several household members as needed.



1

+ → Phone Call

2

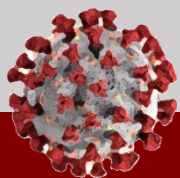
Add Names of Members

3

Save Updates

4

Mark Complete



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5. After closing this call, you may notice an extra phone call appearing on household member profiles marked "SYSTEM GENERATED - FOR TIMESTAMP." This is created by the system in order to update the timestamps on household member profiles for **Most Recent Phone Call**, **First Phone Call** (if applicable), and **System First Outreach Date/Method** (if applicable). **No action is required on this phone call record, and it will disappear automatically within 2 minutes.**
6. Once the call has been closed, the **Most Recent Phone Call**, **First Phone Call** (if applicable), and **System First Outreach Date/Method** (if applicable) fields for each individual will all reflect this household phone call. Timestamps may vary by 1-2 mins. You may need to refresh to see these changes.

5 "System Generated - For Timestamp"

6 Phone calls on Member Profiles

5

Timeline / Activities

Timeline

Search timeline

Enter a note...

Phone Call from Mary Moran
Initial Outreach / Answered
Closed 5/7/2021 3:06 PM

Phone Call from
SYSTEM GENERATED - FOR TIMESTAMP
Closed 5/7/2021 3:06 PM

6

System First Outreach Date	5/7/2021	3:06 PM
System First Outreach Method	Phone Call	
Manual First Outreach Date	---	
Manual First Outreach Method	---	
First Phone Call	5/7/2021	3:06 PM
Most Recent Phone Call	5/7/2021	3:06 PM